LEADING CHANGE TOOLKIT™

TO HELP CHANGE AGENTS AND
CHANGE TEAMS MAKE LASTING
IMPROVEMENTS IN HEALTH CARE

> RNAO   Healthcare Excellence Canada

Getting started with the Knowledge-To-Action Framework: A checklist for change agents

Are you a new change agent or a new member of a change team? Below is a quick checklist of actions to consider when implementing the seven action cycle phases of the Knowledge-To-Action Framework.

IDENTIFY THE PROBLEM

❑ Clearly state the problem

❑ Identify priority gaps and practice challenges to address using the gap (opportunity) analysis tool (for example, a specific practice change or intervention)

❑ Gain a clear understanding of the problem or gap and communicate the results to stakeholders

ADAPT KNOWLEDGE TO LOCAL CONTEXT

❑ Assess local context to consider fit and feasibility

- **Examples:** resources, training, culture, costs, organizational priorities, stakeholder support, environment, leadership support

❑ Identify aspects of the practice change, intervention or recommendation that can be adapted and which of the core components cannot be changed

❑ Identify factors within the context that may impede or facilitate successful implementation

- **Examples:** individual attitude, knowledge, leadership, culture, resources, aspects of the change

❑ Identify resources useful for the team to address contextual challenges

❑ Engage stakeholders to develop an understanding of the meaning of the change

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ASSESS BARRIERS AND FACILITATORS TO KNOWLEDGE USE

❑ Assess the barriers and facilitators related to the practice change, intervention or recommendation, and the benefits of the change

❑ Engage stakeholders to learn about their beliefs and support for the change

❑ Discuss barriers and facilitators with stakeholders

❑ Generate strategies to address any barriers

❑ Provide opportunities for feedback, integrating stakeholder recommendations when possible

SELECT, TAILOR, IMPLEMENT INTERVENTIONS

❑ Develop and prioritize implementation strategies targeted at addressing barriers and leveraging facilitators

❑ Engage stakeholders to help you choose implementation strategies, using practical activities such as concept mapping or intervention mapping

❑ Develop an implementation plan

- **Examples:** which activities to complete, when to implement them, and whom to involve

MONITOR KNOWLEDGE USE

❑ Develop a monitoring plan

❑ Develop process indicators to monitor implementation and knowledge use/practice uptake

- using data from audit & feedback, focus groups, interviews, observation, and/or surveys

- consider target levels such as the number of education sessions, number of outreach activities, and percentage of health-care providers reached with key messages

- consider implementation outcomes to understand whether the practice change worked in the setting, using data from chart audits or surveys (**examples of what to look at:** satisfaction, fit, relevance, adoption, spread or integration)

EVALUATE OUTCOMES

❑ Develop an evaluation plan

- **Examples of what to include:** types of activities, who is responsible, when to complete

❑ Identify outcomes to measure and select appropriate indicators

- **Tip:** consider intervention outcomes such as changes in health status, using data from chart audits, surveys and observations (**examples of what to look at:** satisfaction with care, rate of adverse events, wait times)

SUSTAIN KNOWLEDGE USE

❑ Develop a sustainability plan

- **Tip:** consider how to best continue engaging leaders, aligning with organization priorities, maintaining staff engagement and mobilizing champions

❑ Develop a sustainability measurement plan

- **Tip:** continue to collect data beyond the monitoring and evaluation phase to gauge the ongoing impact on persons/patients, staff, the organization and the health system

Source: Checklist adapted from Best Practice Spotlight Organization® Southlake Regional Health Center's *Leading Change Checklist* (2022). Used with permission.

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